



STATE OF WISCONSIN
Department of Employee Trust Funds
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CORRESPONDENCE MEMORANDUM

DATE: February 19, 2004

TO: Anne Boudreau, Director
Member Services Bureau

FROM: Kristine Butch, Section Chief
Member Services Bureau

SUBJECT: Group Counseling Update

In August 2003, the Department of Employee Trust Funds (ETF) began offering a new customer service initiative of on-site group counseling sessions for the Wisconsin Retirement System (WRS) participants. I am happy to report that the program has been an ongoing success and has been very well received by our participants.

In a group counseling session, participants receive an overview of WRS benefits and annuity calculations along with a step-by-step explanation of the retirement estimate, the annuity options, and the application process. Questions are encouraged throughout these sessions.

Participants are asked to complete an evaluation after each session. Comments and feedback have been overwhelmingly positive. Typical comments include:

- Group works well because everyone can benefit from questions asked.
- A great service to employees.
- Very informative.
- Felt like I was getting personal attention.
- Excellent service.
- Time well spent.
- Enjoyed group atmosphere.

Interest and participation in group counseling sessions have increased at a steady rate since August, as illustrated on the attached chart. To date we have had 244 people attend our sessions. Of that number, 168 were participants and 76 were guests. Through March, 66 more participants are scheduled to attend.

Staff interest in doing group counseling also has grown. Initially we had five specialists volunteer to do group counseling sessions. We now have six, and two more have expressed interest in becoming group counselors.

Our group counseling sessions are designed for 6 – 8 participants and their guests and are free of charge. Sessions are held twice a week in the Madison ETF office—Wednesdays at 1:00 p.m. and Thursdays at 8:30 a.m.

Reviewed and approved by Julie Reneau,
Administrator, Division of Retirement Services.

Signature _____ Date _____

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GROUP COUNSELING ATTENDANCE AUGUST 2003 – FEBRUARY 2004			
	Participants	Guests	Total
August	6	1	7
September	11	2	13
October	29	14	43
November	22	5	27
December	24	8	32
January	38	18	56
February (thru 2-19)	38	28	66
TOTALS	168	76	244